

Using the Appointment Book

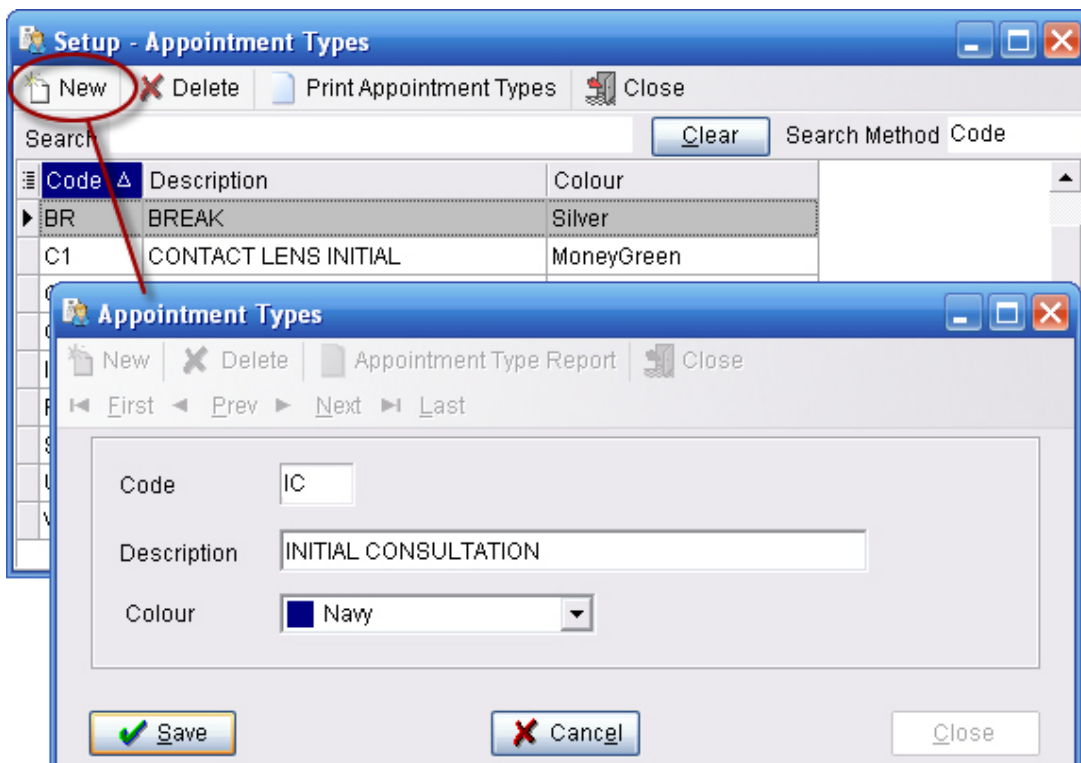
The Optomate Premier Series Appointment Book has been developed based on the Microsoft Outlook calendar. It offers a quick and easy method for finding and entering new appointments, adjusting appointments and organising each day. The Appointment Book also provides the ability to send SMS Appointment Reminders to patients (see the 'SMS - Installing and Sending' help note found on our website: http://www.monkeysoftware.com.au/Download/Premier_SMS.pdf)



Setting up Appointment Types

Begin by setting up the Appointment Types by clicking into the **Setup** ► **General** ► **Appointment Types** menu option as shown.

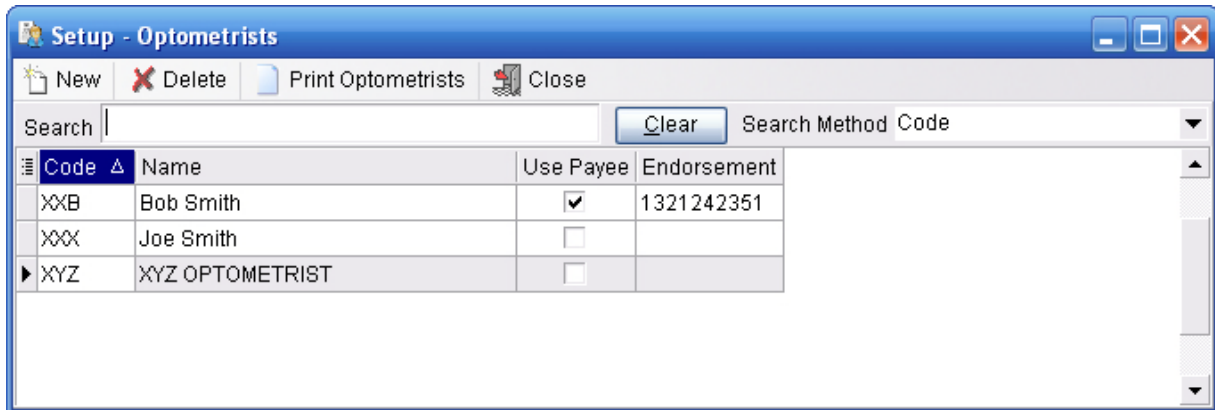
The 'Appointment Type' setup screen will open. Click on the 'New' button and create an Appointment Type. You can set a different colour for each appointment type to help organise your Appointment Book.



Initialising the working hours for each Optometrist

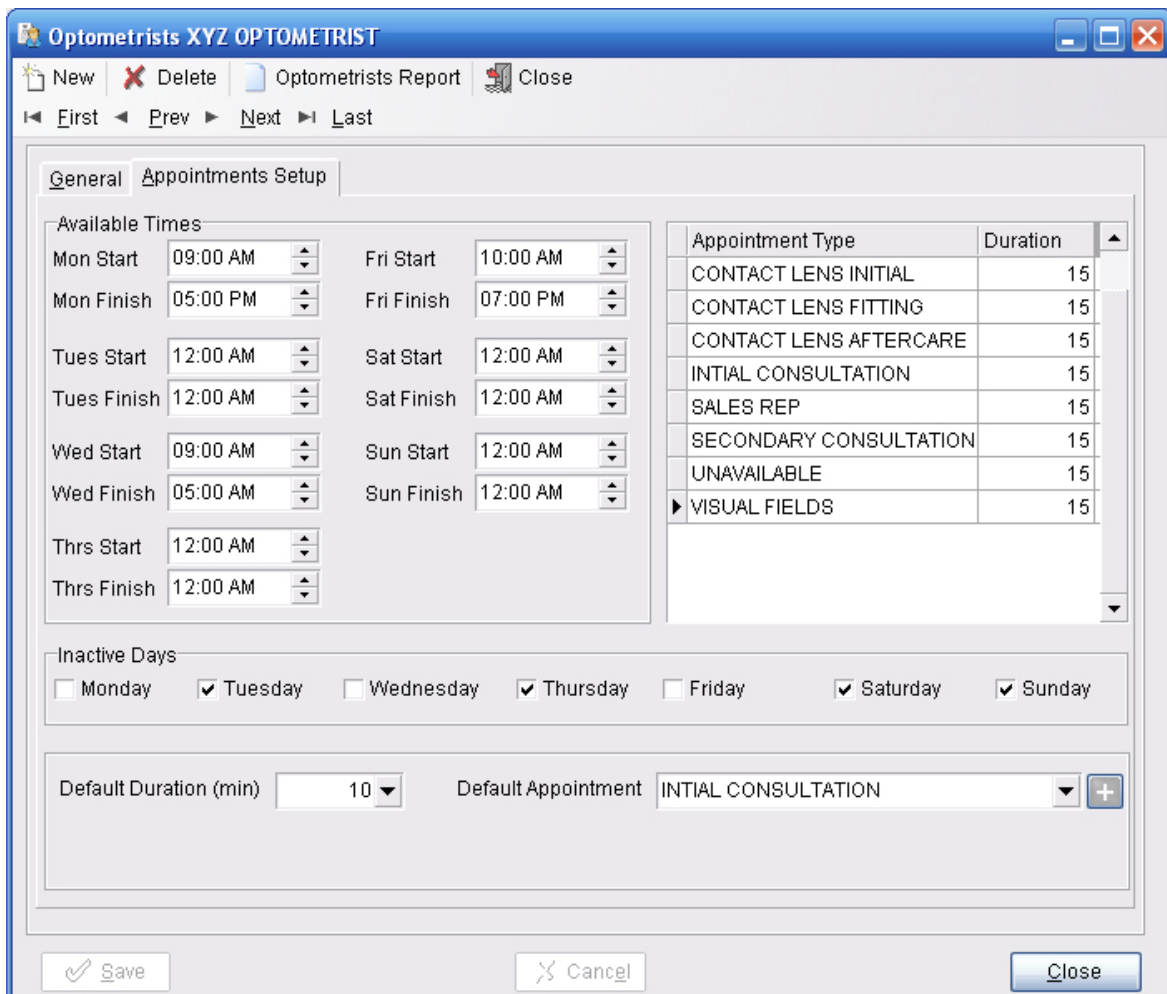
To set the working hours for each Optometrist, you will need to go into the Optometrist Setup file by clicking into the **Setup ► General ► Optometrists** menu option from the main screen.

This is the setup screen for all Optometrists entered into Optomate.



Select an Optometrist from the list. If necessary, you can search for an Optometrist either by 'Code' or by 'Name'. If you need to add an Optometrist, click on 'New' and enter the required details.

To enter the Appointment Setup screen for an existing Optometrist, double click on the Optometrist name then onto the 'Appointments Setup' tab.



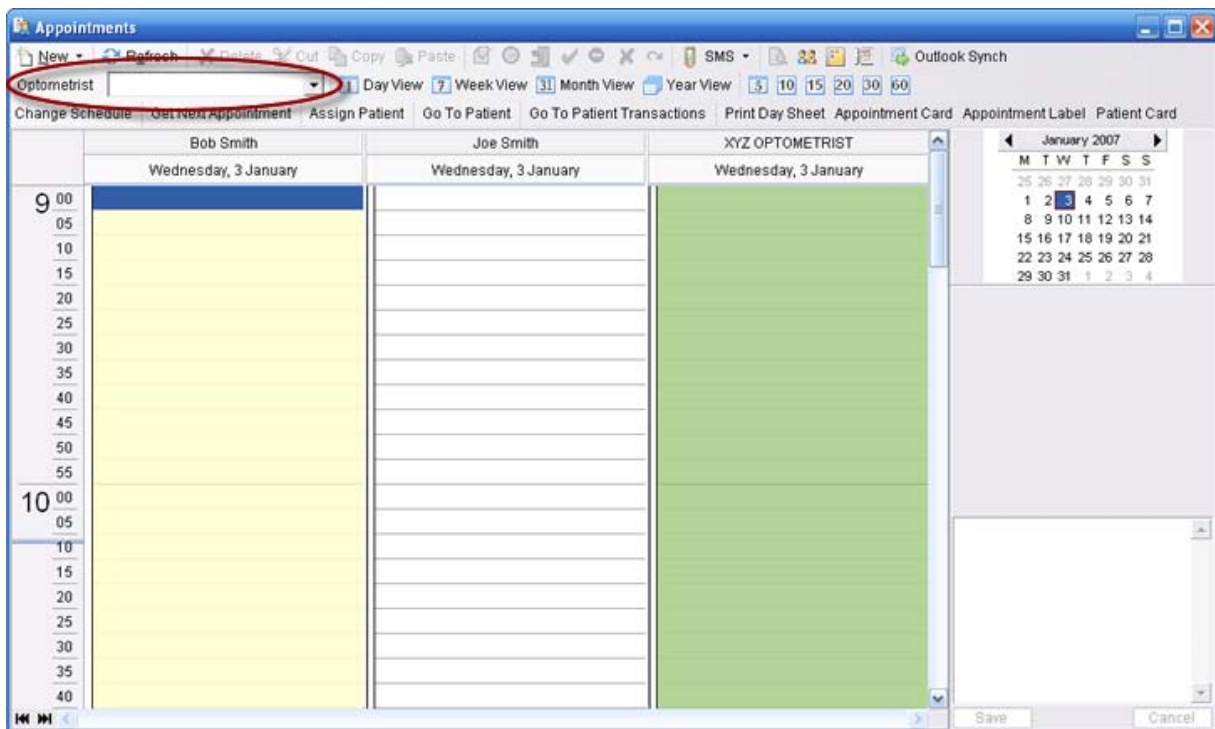
Start by marking the 'Inactive Days', then set the 'Start' and 'Finish' times for the days required.

The final setup needed in the Appointment Setup screen is to select the Default Appointment Type and setting the duration times for each type of appointment. Once you have completed the setup process you can now begin to add appointments.

Using the Appointment Book

The image below is a snap shot of the Optomate Premier Series Appointment Book. By default, all Optometrists' will be displayed unless a Default Optometrist has been defined in System Settings.

To view the appointments for only one Optometrist, simply select a name from the drop-down menu. To view appointments for all Optometrists', delete the Optometrist name from the drop-down menu.



Adding an appointment


There are two ways of adding an appointment in your appointment book. You can double click on the cell where you want to add in an appointment, or click on the [▼] next to the New button and select 'Patient Appointment'.

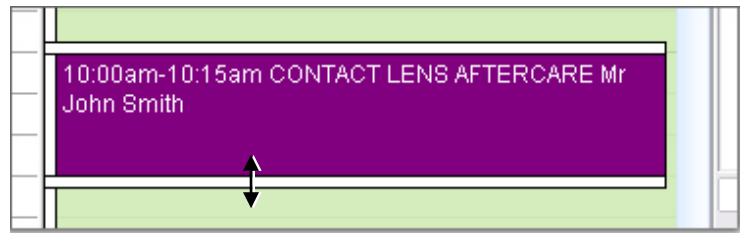
Once in the 'New Appointment' screen, you will need to 'Find Existing Patient'. If the patient does not exist, you can create a record for them by clicking the 'Add New Patient' button. Once you have selected the correct patient, set the **Appointment Type, Date and Time**.

You have the option of setting a reminder for the appointment, which will display a pop-up window at the chosen time. When you have entered all the required information, click Save.

Modifying an existing appointment

To extend or reduce the time for an existing appointment, you can select the cell then drag the top or bottom line up or down. As you drag, you will see the time change.

If you wish to move the appointment from one time slot to another, click on the cell and then pass the mouse pointer on the left hand side of the cell until you see the pointer similar to this .



Deleting an appointment can be done by right clicking on the appointment and selecting Delete Appointment.

Inserting a break








Click on the appropriate time slot to highlight, then click on the [▼] next to the New button and select 'Break'. To set a 'recurring' break you must select a date range greater than one day. Once you have selected a date range, click on **Recurring** and set the frequency of the break.

Adjusting the start & end times

The start and end times for an Optometrist can be altered for an individual day. This can be useful if an Optometrist is away for a day and needs to be made inactive. This option also allows for a recurring time change, (i.e. on the first Monday of every month the Optometrist finishes at 3.00pm instead of 5.00pm etc). To apply an adjustment to an Optometrist when viewing all Optometrists, simply click on an empty cell for the correct Optometrist, then click on the 'Change Schedule'. If you are viewing the appointments for one Optometrist only, simply click on the 'Change Schedule' button. Enter the times required and click 'Save'. You can always go back and adjust the schedule time if required. If you have marked the Optometrist as inactive, you can revert back by simply un-ticking the 'inactive' button.

Appointment Status

You can mark the status of an appointment by clicking on one of the following icons at the top of the appointment screen. The icon will appear next the appointment as an indicator.

-  Appointment Confirmed
-  Appointment Waiting
-  Appointment in Consulting Room
-  Appointment Complete
-  Appointment Cancelled
-  Appointment No Show
-  Reset Appointment

Additional Features

Some other features of the Optomate Premier Series Appointment Book are:

- **Outlook Sync:** You can send your Optomate Appointments into your Microsoft Outlook Calendar.
- **Day Sheet:** A printer friendly version of your daily appointments.
- **Multiple Calendar Views:** Daily, Weekly, Monthly and Yearly.
- **Quick Links to:** Patient File, Optometrist Setup and Appointment Types.

Many more features can be accessed from the 'New' menu at the top of the appointment screen.